



## **Comments Related to Software Procurement within SO10 of the California Performance Review**

The Dravis Group provides research, consultancy and solutions to help organizations understand, plan for and adapt to the changing dynamics of the technology market. We focus on varied technology trends including open source software. Efforts in this area include the publications “Open Source Software: Perspectives for Development” (Nov. 2003) sponsored by infoDev/World Bank, which provides a global context and “Open Source Software: Case Studies Examining its Use” (April 2003).

Open Source is a complex and multifaceted topic and at times not lacking in emotional fervor. The rhetoric is intense, with its focus ranging from new software development methods to various public policy issues.

**Underlying much of the discussion is that “information” in general, and “software” as a means of delivery are unlike other goods and services. Central to this discussion are the issues of when and if information should be “owned” versus “shared”, what is the “value” of software, and when should it be considered a commodity.**

Many questions have been asked by those who build and implement technology solutions.

- Can Open Source Software scale to address needs today and in the future?
- How well does it work?
- What are the best approaches for implementing it and what difficulties may be encountered?
- How well does it co-exist with proprietary software?

Many early adopters of Open Source software started their investigations based on the potential for lowering technology costs, generally implemented open source operating systems (Linux or FreeBSD), databases (MySQL or PostgreSQL), the Apache web server which is used on 67% of the over 3 billion publicly accessible web sites, and development tools such as Perl and PHP.

We do not advocate Open Source software for a specific set of needs, **but we believe that Open Source software use is about increased market choice.** Its emergence is creating more options to address technology needs. New development models have appeared which increase the emphasis on collaboration and community dynamics. New technology solutions are being made available in the marketplace and competition has increased. In addition, IT solutions can consist of a combination of both proprietary and Open Source software components.

**We also believe that when projects combine Open Source use with a focus on interoperability and open standards, more attention can be given to the value of a solution, rather than the technical underpinnings used to support that solution.**



As the discussion of this topic has increased globally, governmental organizations, from the local to the national level, are considering or proposing rules, or providing guidance, in an effort to “level the playing field” between Open Source offerings and those of proprietary providers. The motives and proposals related to these initiatives vary. Because the scope of Open Source is broad, developing a single consensus perspective is unrealistic.

Motives for considering Open Source Software use include:

- controlling the cost of initial software licensing and upgrades,
- increasing the flexible use and interchange of data and information,
- increasing the control over and access to intellectual property,
- reducing the reliance on proprietary software development organizations,
- minimizing information security risks and
- promoting software use in the public sector as a public good.

It is noteworthy that governmental interest and activism is global and not aligned by geographic region, economic group or political philosophy. These initiatives include efforts in Brazil, China, Germany, Malaysia, South Africa, Spain, Thailand, Denmark, the EU, Japan, South Korea and the UK.

Most IT projects must be pursued within the constraints of scarce available resources. It is therefore critically important for state IT decision makers to understand the changes in the technology market when planning their initiatives. We believe that Open Source software represents a significant change within this market.

**Open Source is another phase in the continual evolution of information technology, but it is a significant change.** As such, there is much to explore, **but Open Source is not a panacea.** Assuring that Open Source initiatives are successful and sustainable requires planning, focus, leadership and pragmatism. Open Source does not negate the need for these critical elements in an IT project. **Organizations should review and evaluate both Open Source and proprietary solutions and understand the trade-offs in pursuing both alternatives.**

Open source software has the potential to provide many benefits. At the same time, while software (open source or propriety) is an important part of many IT strategies, it is only one part. In this context, **Open Source use should be evaluated and deployed using the same methodologies and disciplined care as any other IT solution.**

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